portatour®

for Dynamics CRM

My personal sales-route planner

With **portatour® for Dynamics® CRM**, discover the future of fully automated sales-route planning for your field sales force, consultants, and service team members.

www.portatour.com/dynamics-crm/

More customer visits, fewer miles, more time

Are you spending more time in the car and planning than with the customer? Is it hard to put together **a meaningful itinerary** with all of your customers, ranked by priorities, honoring call frequency and scheduled appointments using a road map?

portatour® plans your trips within seconds at the push of a button, giving you back **valuable time** which would otherwise just be left on the road. Visit more customers, drive fewer miles.

Automatic itinerary planning cuts up to 25% of miles driven to customer locations, reducing fleet costs and CO_2 emissions. Especially new employees will be efficiently integrated into your company: You start on the first day in your new sales territory with optimized routes saving miles on the road.

The right customer at the right time

Reach your sales goals by focusing your work on important customers.

Use portatour® to visit A, B, and C customers in the right frequency. portatour® automatically selects which customers to call while also optimizing the driving route.

Customers with **high priority are included more often**, no customers are forgotten, letting you implement your sales strategy consistently and successfully.

Every customer is different: opening times, frequency of calls, planned holidays and duration of your visit can be maintained for each customer in Microsoft Dynamics® CRM and are individually included in portatour's® calculations.

Scheduled **appointments** from your calendar are guaranteed to be included in the schedule. Gaps in your calendar are efficiently filled by portatour® with suggested stops. This way, you'll visit the right customer at the right time.

Seamlessly integrated with Microsoft Dynamics® CRM

The portatour® solution integrates with Microsoft Dynamics® CRM and synchronizes your existing **accounts, contacts, leads and events** for route optimization. You won't have to worry about importing/exporting data to/from an isolated solution.

You can also enjoy the **benefits** of Microsoft Dynamics® CRM: Access possible from any web browser, centralised user management, individual access rights, customizable forms and low maintenance.

integrated with

Microsoft Dynamics

You are the ideal portatour® user

You…

- are active in the **field**
- plan your own tours
- serve more than 100 clients in your area
- visit at least 4 clients per day
- and spend 2 hours a day or more in the car.

You will come to value the help of portatour® in sales-route planning the more complex your planning needs are. This increases with the number of customers to be visited daily, with different frequencies according to customer importance and the restricted visiting hours at your customers' locations.

portatour ® is suitable for any **size of business**: From a one-person company to large corporations with 1,000+ field staff. Users come from many different **industries:** Pharmaceutical, medical, food, industry, commercial equipment, cosmetics and many other sectors.

You decide the way you work

When does your **working day** start? Where do you start? Do you take breaks? How long do you work? portatour® takes your personal way of working into account.

Serve large areas with distant customers efficiently: portatour® plans intelligent tours with **overnight stays** to reduce long travel times. Your preferences, such as your favorite hotels or the days you want to stay home, are naturally taken into account.

Do you like driving fast on motorways? Let portatour® know, so you get schedules that fit your driving style.
Add non-sales appointments to your calendar, too. Now you can **automatically reconcile** meetings at company headquarters, telephone conferences, private appointments at your doctor and other errands **with your customer visits**, saving you time and hassle.

The racing car of route planners

Drive the racing car of route planners. At just the push of a button, portatour® puts together an optimized schedule within **seconds**.

portatour® takes its processing power from the portatour® server farm which brings together many **high-performance servers** that provide a multiple of performance compared to laptop or smartphone processors.

You can calculate schedules for up to **28 days**. Out of millions of possibilities, the portatour® algorithm provides a **mile-optimized** proposed schedule with up to **125 client visits** intelligently selected from your customer database, which can hold up to **1,000 addresses**.

Your Assistant for Schedule Updates

You know as well as anyone: no matter how well planned a schedule is, **unplanned changes** happen in the course of the day: waiting times at customers', contacts who don't show up or who don't have time, urgent appointments that need to be squeezed in, not to mention traffic congestion; all of which can mess up a carefully planned schedule.

Now you can respond at the push of a button and portatour® will update your schedule for the rest of the day starting from your current location. You can customize your schedule at any time by dropping proposed visits or adding additional dates.

Get the overview

See all of your accounts, contacts and leads on a **map**. Where are customers who haven't been visited for a long time? What schedule is portatour® proposing for the coming days?

Take advantage of free time between appointments. Find **surrounding customers** who are open and stop in for a spontaneous visit.

Find your bearings with digital street maps that are updated regularly. The maps are **included** at no extra charge in portatour® – without having the hassle of third party licences.

Perfectly connected on the go

Good news for sales representatives with a preference for "light luggage": You can leave your laptop at home! Your mobile will be all you need for route planning in the future.

portatour® turns any **smartphone** into a personal sales-route planner that automatically synchronizes with Microsoft Dynamics® CRM. You can update your itinerary at any point during your day by just tapping a button. Mobile access to customer and appointment data with built-in call reporting are additional features of portatour®.

Use portatour® on any smartphone or tablet: Apple iPhone, iPad, Android, BlackBerry, Windows Phone, Samsung, HTC, Nokia and other manufacturers are supported. Just open the web browser and get started immediately – no installation of an app necessary.

Simple reports, Intelligent analysis

Log every customer call right after the visit ends at the push of a button on your mobile phone or tablet. This means you can clear your head and get ready for your next presentation; you also spare yourself the burdensome catching-up on reports late in the evening. The data entry form for **call reports** can be adapted to your personal needs.

Analyze your work with **portatour® Report**. Statistics about your area, your customers, frequency of calls will give you valuable information on how you can improve your strategy. In the long term you will also see how many visits per day you need to do to actually achieve your desired call frequency.

Start today

The installation in your Dynamics CRM can be done in **5 minutes**; your administrator can make all necessary configurations. You are ready to go within an hour. Later, you can easily install updates.

To ensure the smooth implementation of automated sales-route planning with portatour® in your business, please contact our **consultants** and **partners** who will help you with best practices to get you started.

Technical Requirements

portatour® is available for Dynamics CRM 2011, 2013 and 2015 in both variants: On-Premise and On-Demand. Rollup 12 is required for Dynamics CRM 2011.

Languages: English, German

Supported regions: Europe, North America, Australia, South Africa

Other languages and countries on request.

Not using Microsoft Dynamics® CRM? Other supported platforms

Features

Route Optimization

Intelligent multi-optimization	✓
Minimized driving distance	✓
Maximized calls/visits	✓
Automatic customer selection	✓
Manual customer selection	✓
Optimized call/visit schedule	✓
Optimized call/visit frequency	✓
Fast calculation	**< 10 Sec.**
Long-term planning	**up to 28 days**
Multiple stops per route	**up to 125**
Optimize anytime	✓
Overnight routes	✓
Daily view	✓
Weekly view	✓
Monthly view	✓
Map view	✓
Driving time and distance	✓
Include new customers	✓
Reminders	✓
Scheduled appointments	✓
Flexible appointments	✓
Full- and multi-day-appointments	✓
Overnight appointments	✓
Recurring appointments	✓
Telephone calls	✓
Special locations	✓
Business hours	✓
Preferred call times	✓
Customers on vacation	✓
Call duration	✓
Launch navigation-software	✓
Route export	✓
iCal-sharing	✓

Personal Settings

Home location	✓
Working hours	✓
Lunch break	✓
Driving speed	✓
Days off	✓
Preferred hotels	✓

Supported Devices and Browsers

PCs & notebooks	✓
… Windows	✓
… Mac OS X	✓
… Linux	✓
Tablets	✓
… iPad	✓
… Android	✓
Smartphones	✓
… iPhone	✓
… Android	✓
… Windows Phone	✓
… BlackBerry	✓
HTML5-browser	✓
… Internet Explorer	✓
… Firefox	✓
… Chrome	✓
… Safari	✓

Help & Support

PDF manual	✓
Online manual	✓
1-2-3-tutorial	✓
Email support	✓
Reply within 24h	✓
Optional training	✓

Quality & Security

Offline capability	✓
High performance servers	✓
High availability	✓
SSL-encrypted communication	✓
Encrypted data storage	✓
Server location Vienna/Europe	✓
Secure data center	✓
Own servers	✓
No installation needed	✓
Automatic updates	✓

Maps with Overview

Route view	✓
All customers view	✓
Filter	✓
Different Coloring	✓
Individual symbols for customers	✓
Own location	✓
Surrounding customers	✓
Automatic geocoding	✓
Map license included	✓
Map updates included	✓

Rich Customer Management

Customers max.	**1000**
Import assistant	✓
… from Excel (XLS, XLSX)	✓
… from OpenDocument (ODS)	✓
… from text-files (CSV, TXT)	✓
Update assistant	✓
Quick search	✓
Alphabetical index	✓
Extended search	✓
Sort & filter	✓
Mass editing	✓
Map view	✓
Create new customers	✓
Automated geocoding	✓
Standard fields	✓
Business hours	✓
Preferred call times	✓
Customers on vacation	✓
Call interval/frequency	✓
Call duration	✓
Last call/visit date	✓
Call/visit history	✓
Upcoming appointments	✓
Call/visit notes	✓
Custom fields	✓
Export	✓
Transfer to other users	✓

Effective Sales Call Reports

Fast report writing	✓
Standard fields	✓
Automatic pre-filling	✓
Custom fields	✓
Follow-up call note	✓
Call history per customer	✓
Export	✓
iCal share	✓
Email delivery	✓

Availability

Languages	
… German	✓
… English	✓
Regions	
… Europe	✓
… North America	✓
… Australia	✓
… South Africa	✓

Start quickly

Free trial	**30 days**
Account in 5 minutes	✓
No credit card required	✓
Quick data import	✓
Try with demo-data	✓
Easy to use	✓

portatour® for Salesforce

Available in AppExchange	✓
Installation in 15 minutes	✓
Supported Versions	
… Professional Edition	✓
… Enterprise Edition	✓
… Unlimited Edition	✓
… Force.com-Platform	✓
Integration with Accounts	✓
Integration with Contacts	✓
Integration with Leads	✓
Integration with Events	✓
Uses existing data	✓
Calculate schedule in Salesforce	✓
View map in Salesforce	✓
Synchronize with Anywhere	✓

portatour® for Microsoft Dynamics CRM

Installation in 15 minutes	✓
Supported Versions	
… Dynamics CRM 2011	✓
… Dynamics CRM 2013	✓
… Dynamics CRM 2015	✓
… On Premise	✓
… On Demand	✓
Integration with Accounts	✓
Integration with Contacts	✓
Integration with Leads	✓
Integration with Appointments	✓
Uses existing data	✓
Synchronize with Anywhere	✓

Meaningful Statistics

Effective calls per day	✓
Ideal calls per day	✓
Effective working hours per day	✓
Average call duration	✓
Call urgency of customers	✓
Overdue customers	✓
Classification by call interval	✓
Classification by call duration	✓
Classification by business hours	✓
Territory analysis by driving distance	✓

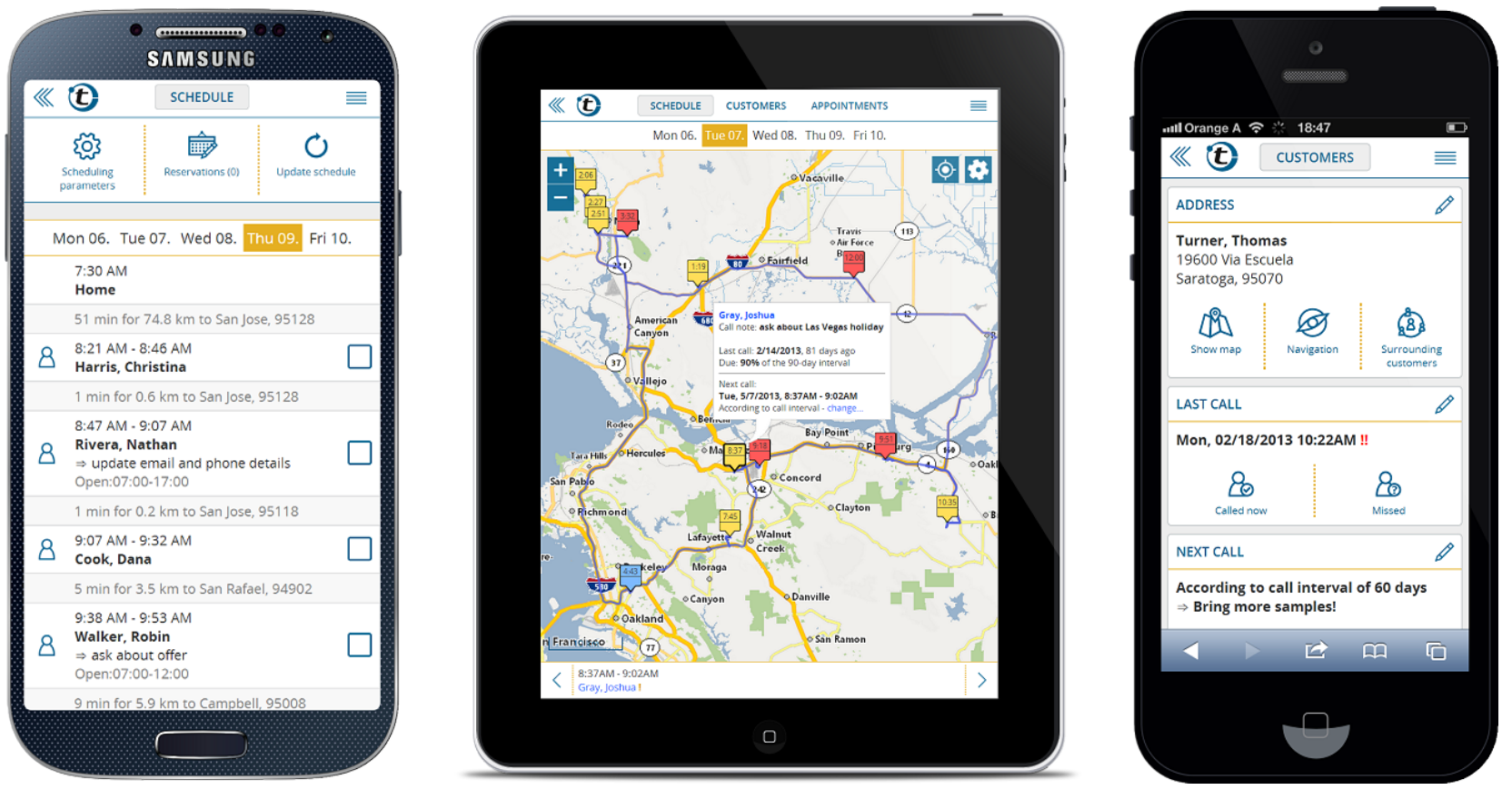
Central Administration for Organizations

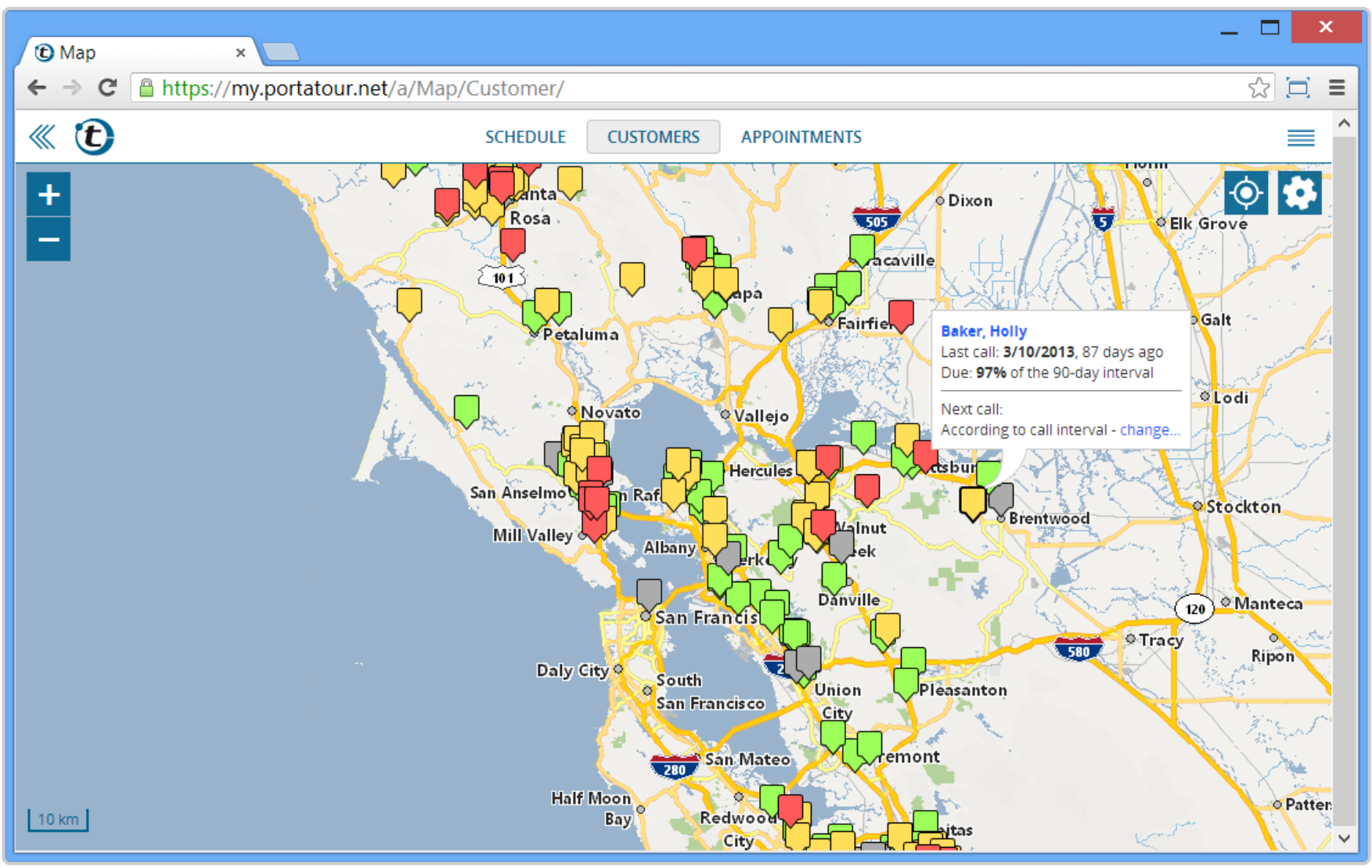
Free admin accounts	✓
Free back office accounts	✓
User management	✓
Log in as different user	✓
Organization-wide default settings	✓
Custom fields	✓
Export all data	✓
Delete all data	✓
Backup & restore	✓
API	✓

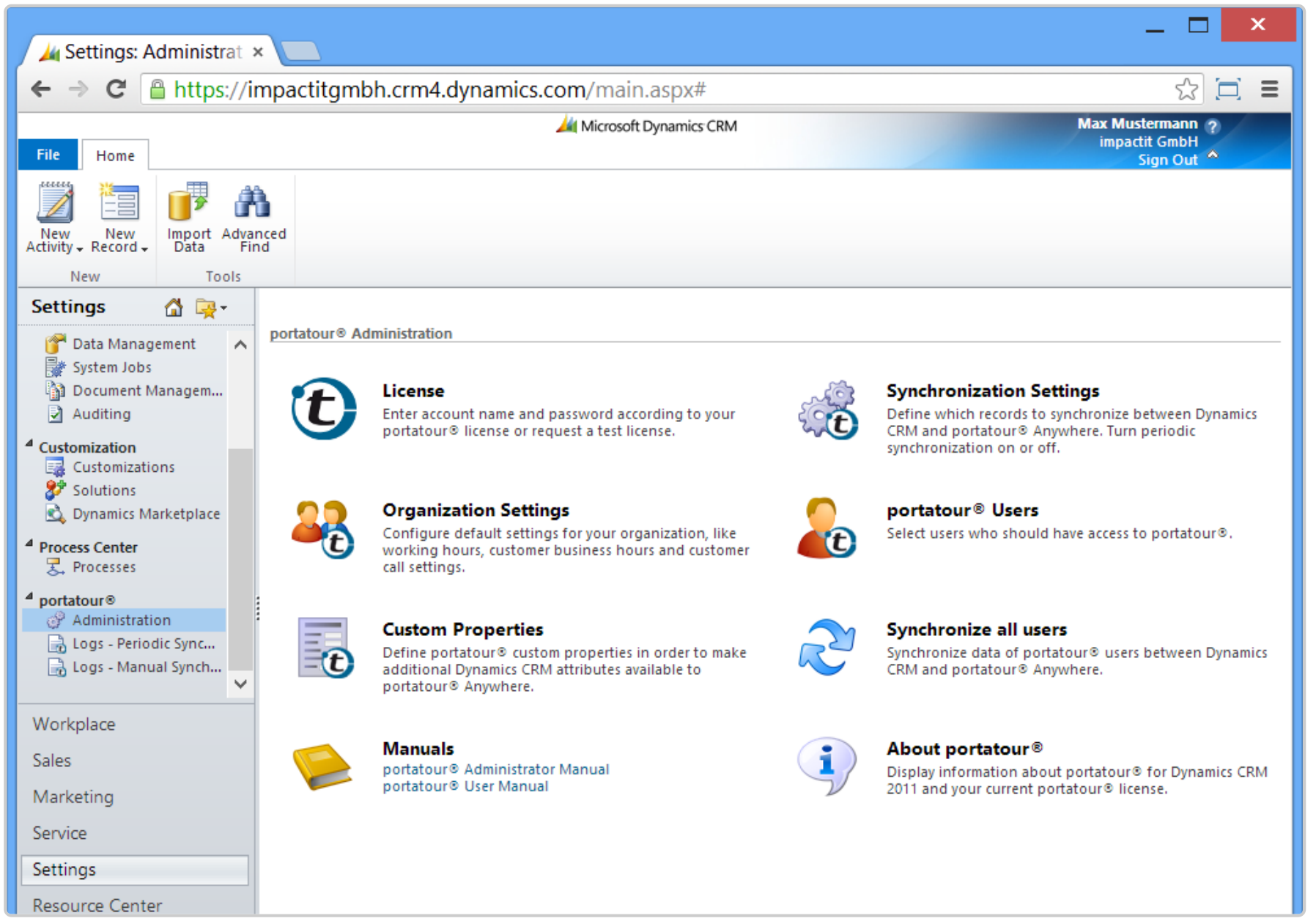
portatour® Connector

Synchronizes with your CRM/ERP	✓
… e.g. Sugar CRM	✓
… e.g. Siebel	✓
… e.g. custom systems	✓
Windows service	✓
XCopy-installation	✓
Configuration with XML-file	✓
Synchronizes data:	
… Users	✓
… Customers	✓
… Appointments	✓
… Call reports	✓
Data format CSV	✓
Data format SQL-views	✓

Screenshots



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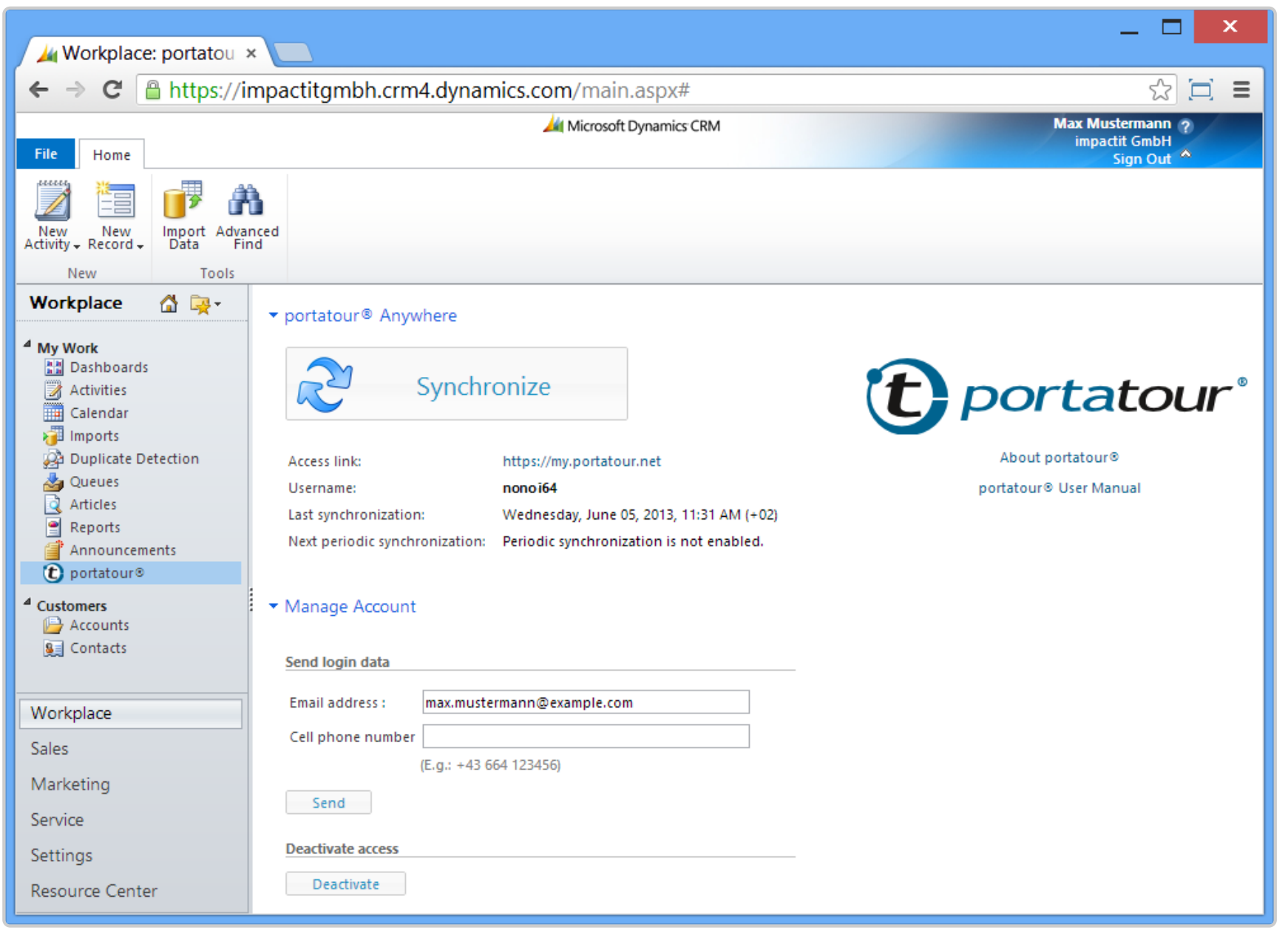
https://impactitgmbh.crm4.dynamics.com/main.aspx#
Microsoft Dynamics CRM
Max Mustermann
impactit GmbH
Sign Out
File
Home
New Activity
New Record
Import Data
Advanced Find
New
Tools
Settings
Data Management
System Jobs
Document Managem...
Auditing
Customization
Customizations
Solutions
Dynamics Marketplace
Process Center
Processes
portatour®
Administration
Logs - Periodic Sync...
Logs - Manual Synch...
Workplace
Sales
Marketing
Service
Settings
Resource Center
portatour® Administration
License
Enter account name and password according to your portatour® license or request a test license.
Synchronization Settings
Define which records to synchronize between Dynamics CRM and portatour® Anywhere. Turn periodic synchronization on or off.
Organization Settings
Configure default settings for your organization, like working hours, customer business hours and customer call settings.
portatour® Users
Select users who should have access to portatour®.
Custom Properties
Define portatour® custom properties in order to make additional Dynamics CRM attributes available to portatour® Anywhere.
Synchronize all users
Synchronize data of portatour® users between Dynamics CRM and portatour® Anywhere.
Manuals
portatour® Administrator Manual
portatour® User Manual
About portatour®
Display information about portatour® for Dynamics CRM 2011 and your current portatour® license.


Workplace: portatou
https://impactitgmbh.crm4.dynamics.com/main.aspx#
Microsoft Dynamics CRM
Max Mustermann
impactit GmbH
Sign Out
File
Home
New Activity
New Record
Import Data
Advanced Find
New
Tools
Workplace
My Work
Dashboards
Activities
Calendar
Imports
Duplicate Detection
Queues
Articles
Reports
Announcements
portatour®
Customers
Accounts
Contacts
Workplace
Sales
Marketing
Service
Settings
Resource Center
portatour® Anywhere
Synchronize
Access link: https://my.portatour.net
Username: nonoi64
Last synchronization: Wednesday, June 05, 2013, 11:31 AM (+02)
Next periodic synchronization: Periodic synchronization is not enabled.
About portatour®
portatour® User Manual
Manage Account
Send login data
Email address : max.mustermann@example.com
Cell phone number
(E.g.: +43 664 123456)
Send
Deactivate access
Deactivate

portatour®already in use by

... and many more.

References

”A dynamic company such as Samsung requires a dynamic route planner! Call frequencies are now in firm control thanks to portatour®.

Samsung
Severin Bolliger

”Once our sales reps started using portatour®, we uncovered a wealth of potential new leads.

Kao Australia
Rodney Macnamara

”The sales force is always faced with the problem: “How do I structure my day?” With portatour® I finally have a system that plans my working day efficiently at the push of a button.

KS Medizintechnik
Jörg Heinser

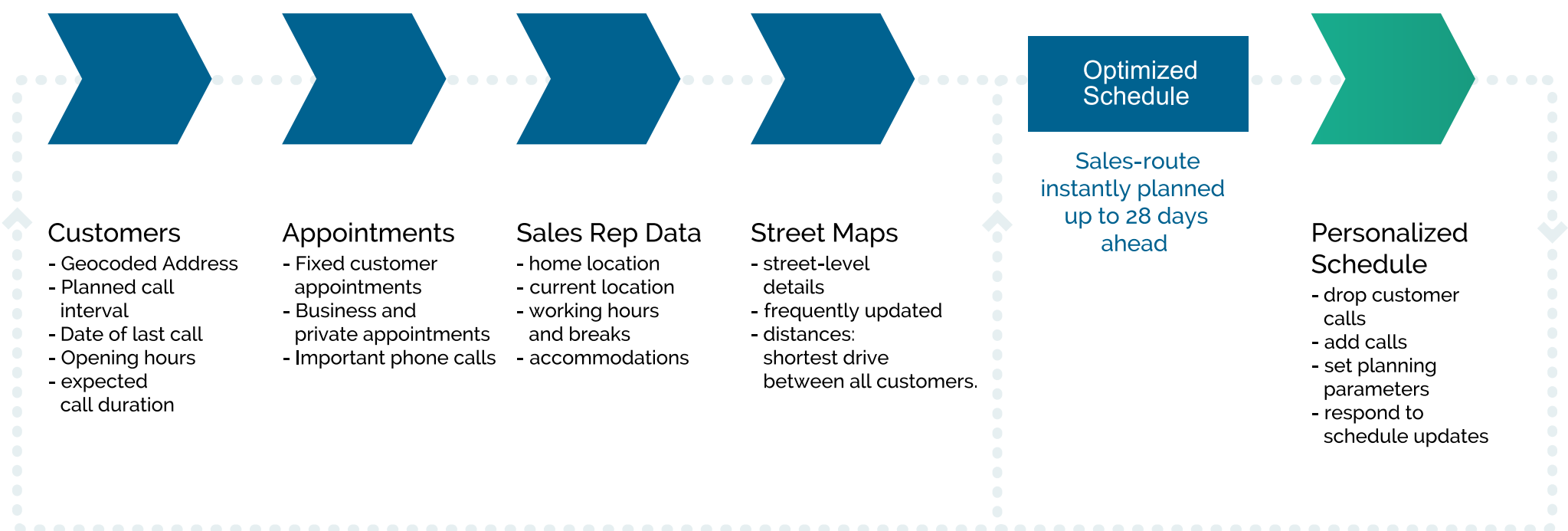
”Visiting the right store at the right time increased revenue by 15%.

Scandinavian Tobacco Group
Mark Hooks

”portatour® has brought us a 6% increase in buying customers in just 9 months and has thereby improved our sales revenue considerably.

TUNAP
Sebastian Zimmermann

How portatour® works



Products

portatour® is available in the following versions:

Anywhere - portatour® for the web

portatour® Anywhere runs in your web-browser on your desktop PC, notebook, tablet and smartphone. Create your account, upload customers, and start driving on your optimized sales-route today. You don't have to install anything, no need for extra software.

portatour® for Salesforce®

The portatour® app seamlessly integrates with Salesforce and Force.com applications and uses your existing accounts, contacts, leads and appointments in your calendar. The installation in your Salesforce organization via Salesforce AppExchange can be done in less than 15 minutes; your administrator can make all necessary adjustments on the first day.

portatour® for Microsoft Dynamics® CRM

For both on-premise and on-demand versions of Dynamics CRM 2011, 2013 and 2015, we offer a complete solution for synchronizing customers, contacts, leads and appointments between CRM and portatour®. Within 15 minutes, your administrator has installed and configured the app, users can access the full functionality of portatour® to make schedules and report calls as a webapp on their smartphones, tablets and notebooks.

portatour® Connector

portatour® brings your customer data to the road. Regardless of which ERP/CRM system you use, portatour® Connector gives your sales team access to all relevant data on their smartphone, tablet and notebook. Synchronization works in both directions. As part of an implementation project, portatour® Connector is installed in your IT landscape and adapted to your requirements. We offer standard configuration templates for SugarCRM, Oracle Siebel and Microsoft Dynamics CRM 4.

Frequently Asked Questions

How much do I save with portatour®? When is the return of invest?

Automated itinerary planning can save between 10–25% of the miles driven per customer visit, depending on your industry and region. portatour® usually pays for itself if you save 3% of your mileage costs or achieve an extra customer visit per month.
In addition, consistently using portatour's® proposed schedules will lead to a higher frequency of calls to important category-A customers and thus yield more revenue per visit. Customers with lower priority are visited less often, but not forgotten!
Create your own return-of-investment calculation in the portatour® shop.

Will portatour® record the routes I drive?

No; portatour® does not store GPS records.

Can I use portatour® with Salesforce, Dynamics CRM or other CRM/ERP systems?

Yes, portatour® works with Salesforce, Microsoft Dynamics CRM 2011, 2013 and 2015, Siebel CRM, Sugar CRM and other CRM/ERP systems.

A customer calls and wants to have an appointment—how does portatour® react?

You can enter the appointment directly into portatour® or into Microsoft Dynamics® CRM. portatour® detects conflicts in your schedule and optimizes your itinerary to reflect the revised schedule. That way, you still have an optimized route even if your schedule changes.

Can portatour® help me avoid traffic jams?

Current traffic situation is not taken into account; use the navigation system of your vehicle or smartphone. portatour® can start your smartphone's navigation system at the push of a button.

Does portatour® help me win new customers?

Yes. Import your new customers with Microsoft Dynamics® CRM and portatour® calculates optimized route plans for you to reach new customers in the most efficient way in addition to attending to your existing customers.

Which uses cases is portatour® suitable for?

portatour® is used for field sales with regular client calls, one-time visits as part of a product launch, pricing and inventory control in outlets, mystery shopping, new customer acquisition, recurring service activities.

I'd like to get a demonstration of portatour ®.

Would you like to present the sales-tour-planning software portatour® to your company? We are happy to prepare an online presentation for your management, sales management, IT management and key sales representatives, where we cater to your situation and answer individual questions. Contact us today.

Can I try portatour® without obligation or cost?

Yes. Sign up for a free trial of portatour® Anywhere, a web-version without further requirements. The trial license will automatically expire after 30 days and is limited to 2 field reps. There are no costs. You can also try an integration into the CRM of your choice.

Is portatour® for centralized or decentralized route planning?

For field sales, it's particularly important to respond to customer needs flexibly without having to adhere to any rigid, centrally planned schedules. portatour® is therefore a decentralised tour planner, i.e. the salesperson always plans his or her schedules independently and can optimize them dynamically by pressing a button.

Can I use portatour® for districting or geo-marketing?

No; portatour® is a sales-route planner and therefore requires an assignment of customers to sales representatives. For sales region planning, we work with partners proficient in geomarketing. We'll be glad to establish a contact to set up special terms in connection with portatour®.

Can I buy a perpetual portatour® license?

No – portatour® is a "software as a service" application. You subscribe to portatour® as a service and save yourself costs for server hardware, software, installation, maintenance and operation. portatour® is ready from the first day, is constantly updated, works on any device with a web browser and uses the computing power of the portatour® server farm. Depending on the number of users, you can choose between quarterly and annual payments.

Is there an offline version of portatour®?

portatour® is an online-web-application with support for offline data storage. In situations without internet connection, your most important data is readily available offline in your browser. portatour® is optimized for using a low bandwidth, as is typical for mobile use. Being a web-application, it removes the need for installation and updates on your mobile devices and leverages the computing power of the portatour® server farm for route-optimization.

For which industries is portatour® suitable?

portatour® is suitable for any size of business: From a one-person company to large corporations with 1,000+ field staff. Users come from many different industries: Pharmaceutical, medical, cosmetic, food, industrial and commercial needs, wholesale, collection agencies, toys, paper and stationery, merchandise, chemicals, paints and coatings, electronics, workshop supplies, craft supplies, car accessories, optics, drinks, food and beverage, tobacco, heating and sanitary, market research, mystery shopping, building services, sports and leisure goods, clothing and textiles, machinery, spare parts, materials, furniture and equipment, telecommunications, dental needs.

How do I get help and support for portatour®?

Once installed, the administrator and user manual can be found in Dynamics on the portatour® tab. The manuals are available in German and English and offer answers to frequently asked questions in addition to a complete description of the application. Our support team is also happy to help you via email.

How secure is portatour®?

portatour® uses the most advanced security standards: The communication between the device and portatour® servers is SSL encrypted; to gain access you need a username and password. The portatour® servers are protected by firewalls; data is stored on encrypted disks on multiple database servers. The data centre has biometric access control and video surveillance . We do not share your data with third parties. More information on data security at portatour®.

Is portatour® available 24/7?

portatour® is designed for high availability: Multiple redundant high performance servers with automatic load balancing and failsafes, 24/7-Monitoring with automatic alarm, redundant fiber connectivity to the Internet, redundant power supply, additionally UPS and diesel generator, redundant air conditioning and fire alarm system with smoke detection and extinguishing system.

Contact us today!

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sales@portatour.com
Skype: leo.sauermann.portatour

You can reach me
09:00-18:00 Vienna Time
08:00-18:00 London Time
07:00-14:00 New York Time
07:00-11:00 Los Angeles Time

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Microsoft Outlook and Microsoft Dynamics are trademarks of Microsoft Corporation.
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portatour® - the future of
personal sales-route planning
for field sales representatives,
consulting and service team members

A service of:
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1100 Vienna, Austria
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